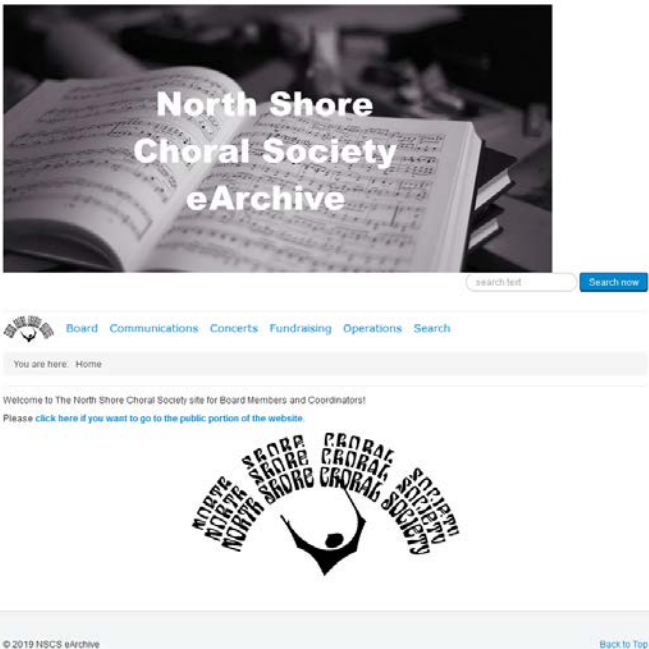

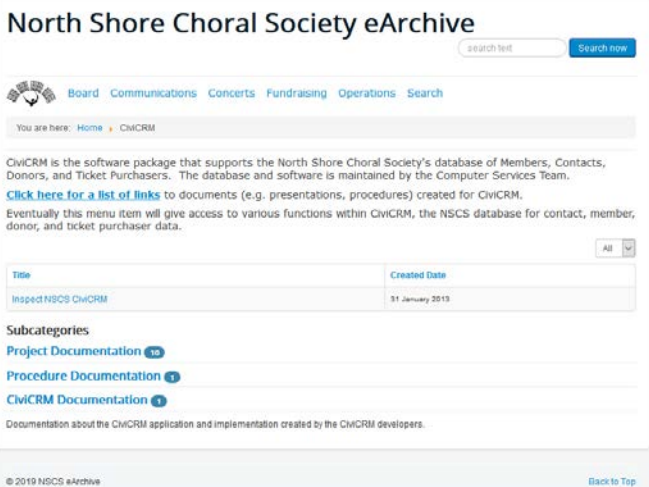
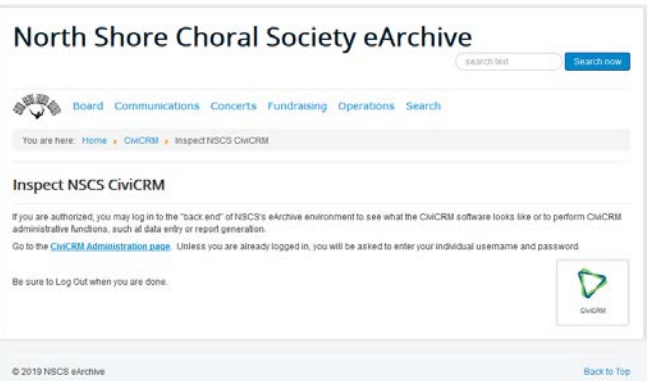

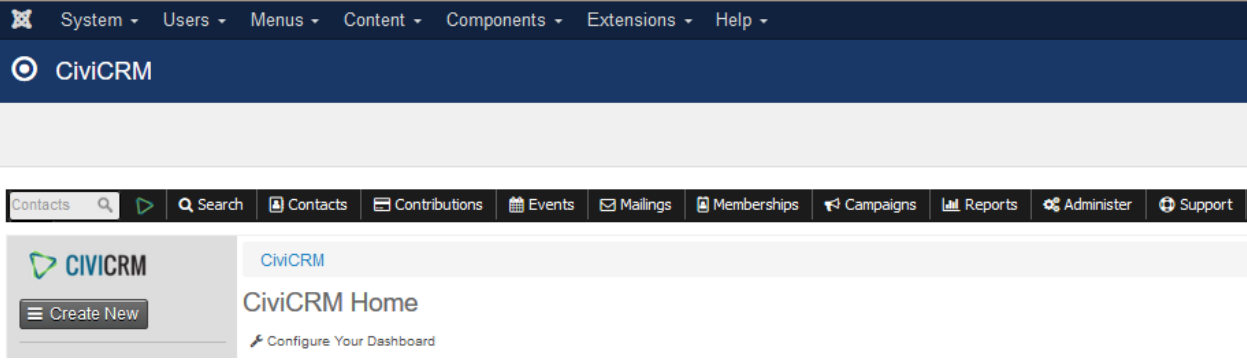
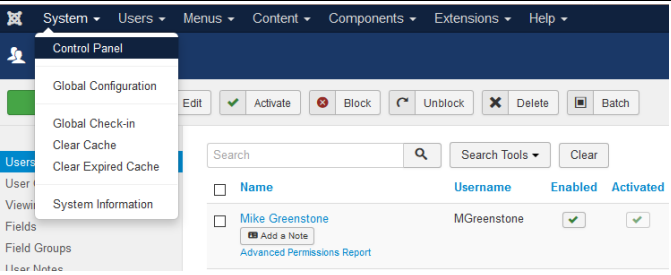


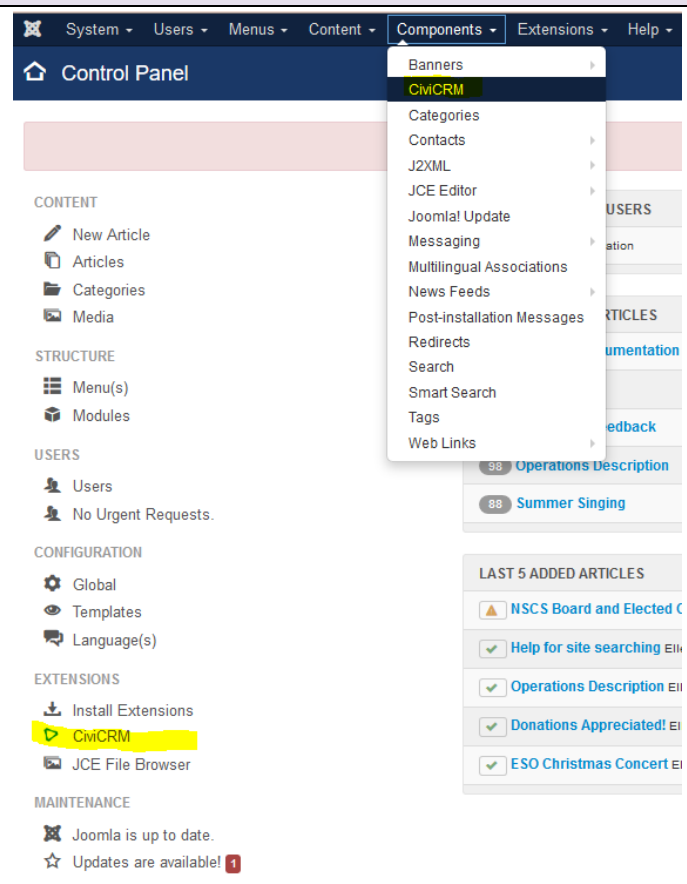
North Shore Choral Society Job Procedures: Computer Services Team


Illustrations: Joomla front end	Notes
<p>The NCS CRM Relationship Management website is now part of the NSCS eArchive website located at https://nscscrm.northshorechoral.us/</p>	
	<p>1. This is the Home page.</p> <p>One way to get to the CiviCRM backend administration screens is to click on the Operations menu.</p> 
	<p>2. This is the CiviCRM documentation page, a “work in progress” as part of the eArchive project.</p> <p>CiviCRM Project and procedure documentation will be available via links on this page.</p> <p>Select the Inspect NSCS CiviCRM link in the middle of the screen.</p>
	<p>3. This is the Inspect NSCS CiviCRM article page.</p> <p>Click on the link text or the CiviCRM icon to get to the login screen.</p> <p>You can also access the CiviCRM admin site directly through this URL (without going through the eArchive): https://bit.ly/nscscivi</p>

North Shore Choral Society Job Procedures: Computer Services Team

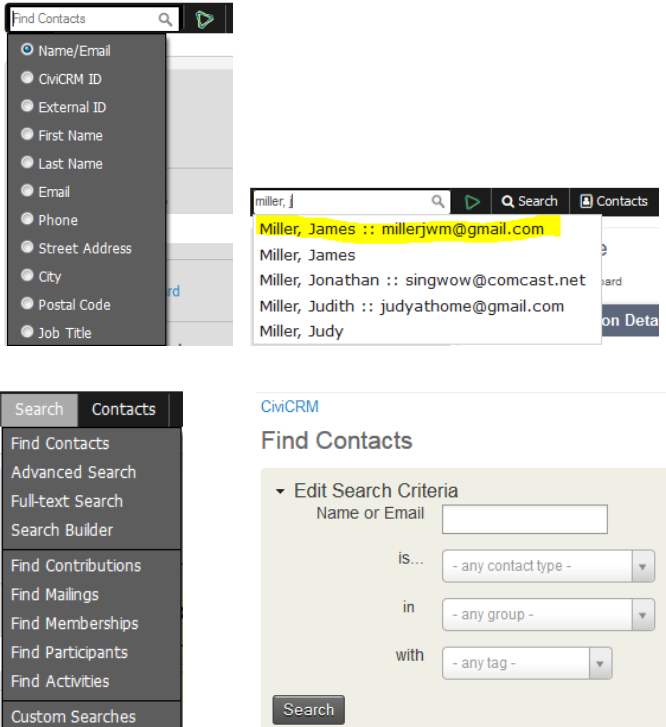
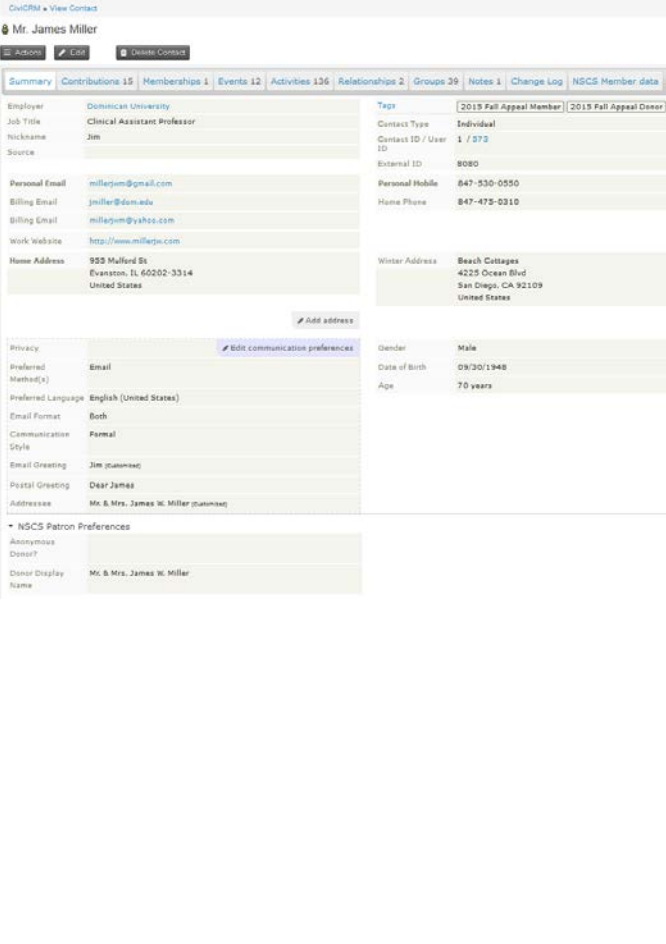
Illustrations: Joomla front end	Notes
 <p>The screenshot shows the Joomla! login interface. It features the Joomla! logo at the top left. Below the logo are two input fields: 'Username' and 'Password', both highlighted in yellow. A blue 'Log in' button is positioned below the password field.</p>	<p>4. Enter your individual username and password, and click Log in.</p>
<p>The CiviCRM procedure illustrations assume you have been successful in logging in to the CiviCRM backend component of the NSCS eArchive Joomla website.</p>  <p>The screenshot displays the CiviCRM dashboard. At the top, there is a Joomla! menu with options: System, Users, Menus, Content, Components, Extensions, and Help. Below this is a dark blue header with the CiviCRM logo and 'CiviCRM Home' text. A secondary navigation bar contains icons for Contacts, Search, Contributions, Events, Mailings, Memberships, Campaigns, Reports, Administer, and Support. The main content area shows the CiviCRM logo, a 'Create New' button, and a 'Configure Your Dashboard' link.</p> <p>The menu at the very top of the window is the Joomla menu; this is used to maintain the entire eArchive website.</p> <p>The menu line with the Contact Search option on the left is used for CiviCRM. This is the one used for all CiviCRM data entry, maintenance, and report/file generation.</p>	
 <p>The screenshot shows the Joomla! Control Panel. The 'Users' menu item is selected, and a dropdown menu is open showing options: Global Configuration, Global Check-in, Clear Cache, Clear Expired Cache, and System Information. The main content area displays a list of users, including 'Mike Greenstone' with a username of 'MGreenstone'. The interface includes search bars, a search tools dropdown, and a clear button.</p>	<p>5. If you select a Joomla menu item, you can return to the CiviCRM component in several ways.</p> <p>One way is via the Joomla Control Panel.</p>

North Shore Choral Society Job Procedures: Computer Services Team

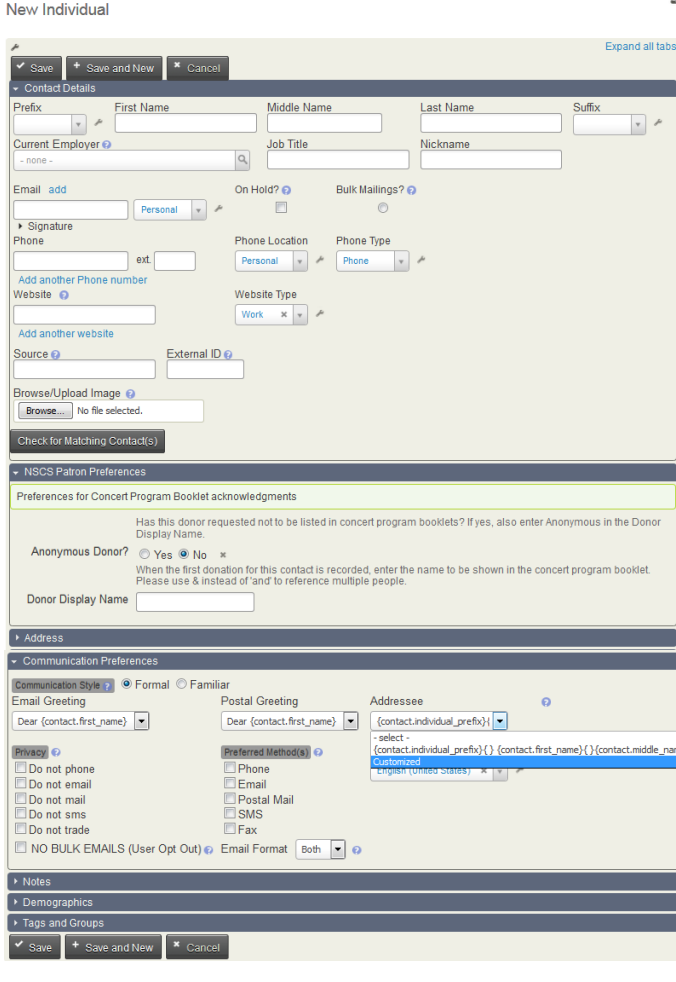
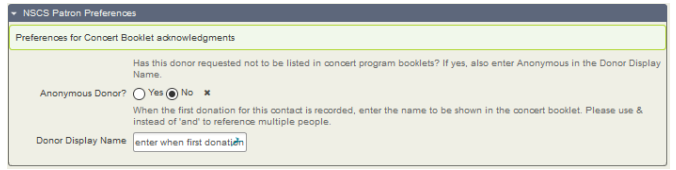
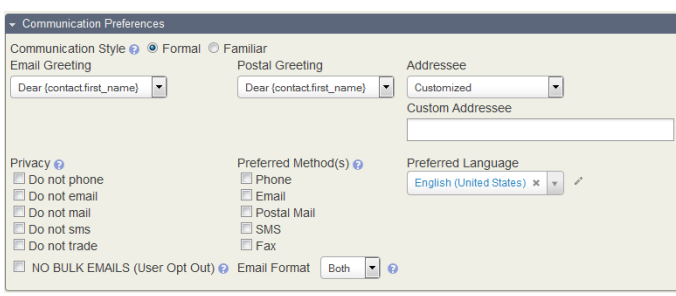
Illustrations: Joomla front end	Notes
 <p>The screenshot shows the Joomla! administrator interface. The top navigation bar includes 'System', 'Users', 'Menus', 'Content', 'Components', 'Extensions', and 'Help'. The 'Control Panel' is visible on the left. The 'Components' menu is open, showing a list of components with 'CiviCRM' highlighted in yellow. Other components listed include Banners, Categories, Contacts, J2XML, JCE Editor, Joomla! Update, Messaging, Multilingual Associations, News Feeds, Post-installation Messages, Redirects, Search, Smart Search, Tags, and Web Links. The left sidebar contains sections for CONTENT, STRUCTURE, USERS, CONFIGURATION, EXTENSIONS, and MAINTENANCE. The 'EXTENSIONS' section shows 'CiviCRM' with a play button icon.</p>	<p>6. On the Control Panel, you can access CiviCRM either by the link in the components menu</p> <p>Or by the link under Extensions in the left hand column.</p> <p>Single-click to access CiviCRM.</p> <p>If you login to Joomla via the eArchive administrator link, https://nscscrm.northshorechoral.us/administrator/index.php you will see the Control Panel.</p>

Illustrations: CiviCRM administration	Notes
<p>The CiviCRM procedure illustrations assume you are logged in to the Joomla back end (administrator functions) and are accessing the CiviCRM component.</p>	
 <p>The screenshot shows the CiviCRM Home page within the Joomla! administrator interface. The top navigation bar includes 'System', 'Users', 'Menus', 'Content', 'Components', 'Extensions', and 'Help'. The 'CiviCRM' component is selected. The main content area displays the 'CiviCRM Home' page with a 'Configure Your Dashboard' link. A yellow message box says 'Welcome to your Home Dashboard' and explains that the dashboard provides a one-screen view of important data. On the left sidebar, there are sections for 'Recent Items' (showing 'Ellen Pullin'), 'My Contact Dashboard', and 'New Individual' (with input fields for First Name, Last Name, and Email, and a 'Save' button). The footer includes 'Powered by CiviCRM 5.7.0' and 'System Status: Error'.</p>	<p>This is the CiviCRM Home page.</p> <p>Note: You can use the link to configure your own Dashboard.</p> <p>It might be useful to include a Contribution report and an Events report that shows Concert Tickets Purchased. That way you can quickly verify the latest entries.</p>

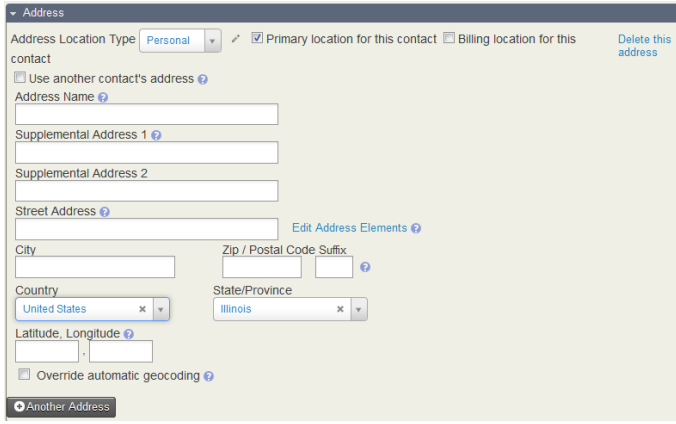
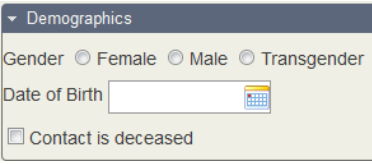
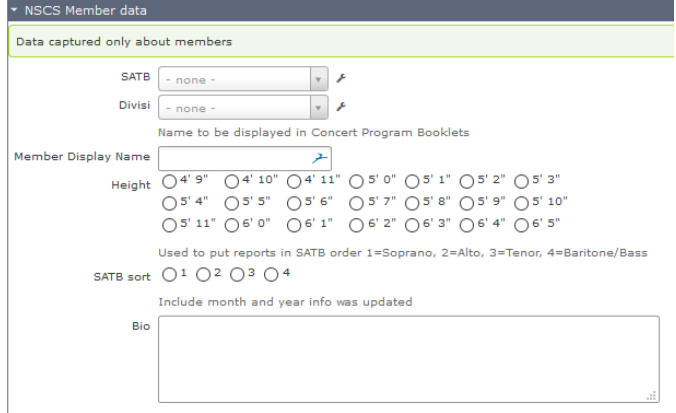

North Shore Choral Society Job Procedures: Computer Services Team

Illustrations: CiviCRM (Contacts)	Notes
 <p>The screenshot shows the CiviCRM search interface. On the left, there is a 'Find Contacts' dropdown menu with options: Name/Email (selected), CiviCRM ID, External ID, First Name, Last Name, Email, Phone, Street Address, City, Postal Code, and Job Title. The main search area has a search box containing 'miller, j' and a list of results: 'Miller, James :: millerjwm@gmail.com', 'Miller, James', 'Miller, Jonathan :: singwow@comcast.net', 'Miller, Judith :: judyathome@gmail.com', and 'Miller, Judy'. Below this is the 'Edit Search Criteria' form with fields for 'Name or Email', 'is...' (contact type), 'in' (group), and 'with' (tag), and a 'Search' button.</p>	<p>Contact Searches</p> <p>1. There are multiple ways to search for a contact to initiate an update for that contact's info, or for other data related to that contact (contributions, ticket purchases, membership info)</p> <p>The easiest is to type Last Name, Firstname in the Search box. Multiple choices may be displayed. If so, pick the closest match and make sure you've got the right one by checking other info (address, phone, etc.)</p>
 <p>The screenshot shows the 'View Contact' screen for Mr. James Miller. It includes tabs for Summary, Contributions (15), Memberships (1), Events (12), Activities (136), Relationships (2), Groups (39), Notes (1), Change Log, and NSCS Member data. The contact details are organized into sections: Personal (Employer: Dominican University, Job Title: Clinical Assistant Professor, Nickname: Jim, Source: millerjwm@gmail.com), Billing (Billing Email: jmiller@dom.edu, Billing Email: millerjwm@yahoo.com, Work Website: http://www.millerjwm.com), Home Address (955 Mulford St, Evanston, IL 60202-3314, United States), Winter Address (Beach Cottages, 4225 Ocean Blvd, San Diego, CA 92109, United States), Privacy (Preferred Method: Email, Preferred Language: English (United States), Email Format: Both, Communication Style: Formal, Email Greeting: Jim (username), Postal Greeting: Dear James), Addresses (Mr. & Mrs. James W. Miller (main)), and NSCS Patron Preferences (Anonymous Donor?, Donor Display Name: Mr. & Mrs. James W. Miller).</p>	<p>Contact Data Update</p> <p>2. To update info for a specific contact already in CiviCRM, start with the View Contact screen. Mouse over specific sections (email, phone, address, communication preferences, etc.) for the option to update just that data. The NSCS Member data tab has data only captured for members. The External ID field is the NSCS dBase ID (pre-CiviCRM). When an individual dies, we set the Is Deceased indicator (in the Demographics section) and turn off communications (in the Communications Preferences section) rather than deleting that person's record. This allows us to maintain referential integrity within the database.</p>

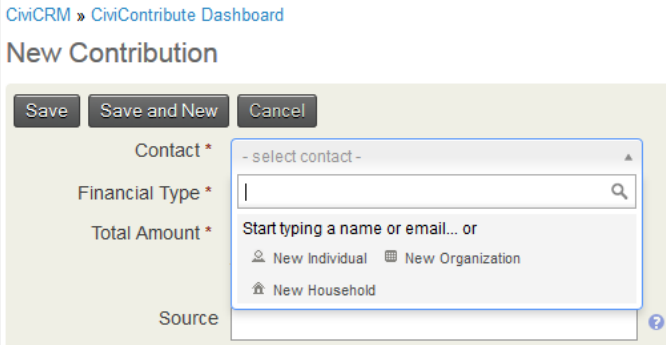
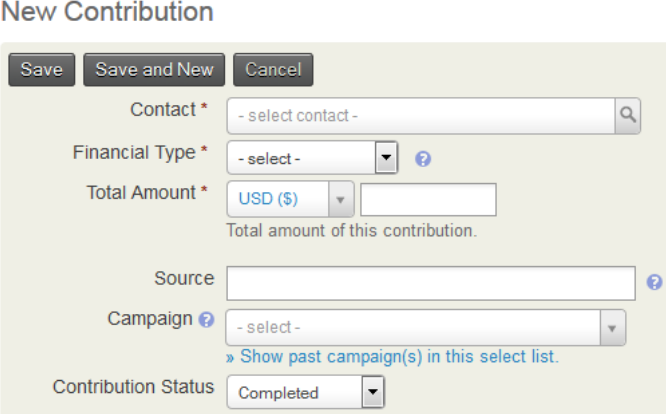
North Shore Choral Society Job Procedures: Computer Services Team

Illustrations: CiviCRM (Contacts)	Notes
	<p>3. The screen to enter data for a New Individual looks different.</p> <p>The Notes section can be used to record explanations when there are multiple email or phone numbers entered, particularly when more than one person is involved. CiviCRM intends that and Individual record represent just one person. However, instead of creating Households and linking Individuals, we are using the Custom Addressee (in Communication Preferences) to contain names of couples to be used for addressing envelopes.</p> <p>Use & instead of “<i>and</i>” in the Custom Addressee field.</p> <p>If an email “bounces”, mark it as On Hold? rather than deleting it, unless notified that the contact is no longer using that account.</p>
	<p>4. Use the Patron Preferences section used to enter preferences the first time a contribution is received from a contact.</p>
	<p>5. The Privacy fields distinguish between different types of communication methods. Do not mail corresponds to the dBase MAILING = FALSE. The Opt Out (unsubscribe) for bulk emails is recorded here.</p>

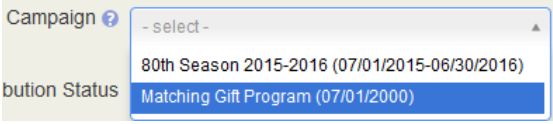
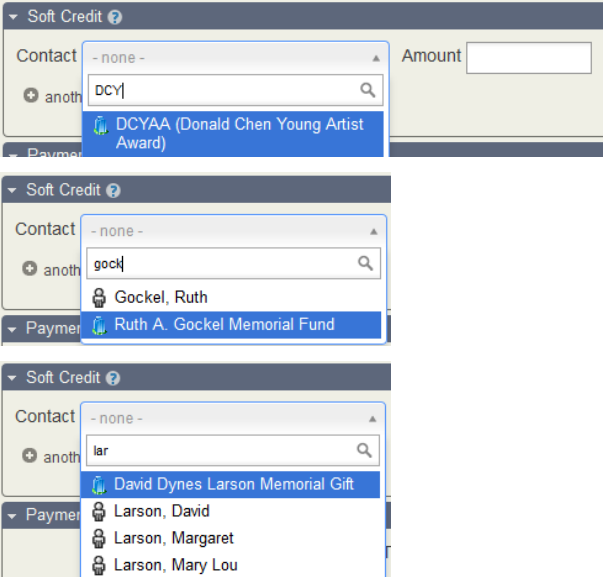
North Shore Choral Society Job Procedures: Computer Services Team

Illustrations: CiviCRM (Contacts)	Notes
 <p>The screenshot shows the 'Address' form in CiviCRM. It includes fields for 'Address Location Type' (set to 'Personal'), 'Primary location for this contact' (checked), and 'Billing location for this contact' (unchecked). There are also checkboxes for 'Use another contact's address' and 'Override automatic geocoding'. The form contains several text input fields: 'Address Name', 'Supplemental Address 1', 'Supplemental Address 2', and 'Street Address'. There are also dropdown menus for 'Country' (set to 'United States') and 'State/Province' (set to 'Illinois'). A 'City' field and a 'Zip / Postal Code Suffix' field are also present. A 'Latitude, Longitude' field is at the bottom. A 'Delete this address' link is visible on the right.</p>	<p>6. CiviCRM can record multiple addresses for a contact. Addresses are identified as “Billing” when the only way we know about them is from a PayPal transaction.</p> <p>PO BOX info must be entered in Supplemental Address 1, (or Supplemental Address 2 if Supplemental Address 1 is being used for something else) not Street Address.</p>
 <p>The screenshot shows the 'Demographics' form in CiviCRM. It includes radio buttons for 'Gender' with options 'Female', 'Male', and 'Transgender'. There is a 'Date of Birth' field with a calendar icon. A checkbox labeled 'Contact is deceased' is at the bottom.</p>	<p>7. We don't usually record Gender or Date of Birth data. The Contact is deceased is prominently displayed and selection logic may ask if you want to exclude deceased individuals. (We do have some, because we imported their donations/member info.)</p>
 <p>The screenshot shows the 'NSCS Member data' form in CiviCRM. It includes dropdown menus for 'SATB' and 'Divisi', both set to '- none -'. There is a text field for 'Member Display Name'. A 'Height' section has radio buttons for various height options: 4' 9", 4' 10", 4' 11", 5' 0", 5' 1", 5' 2", 5' 3", 5' 4", 5' 5", 5' 6", 5' 7", 5' 8", 5' 9", 5' 10", 5' 11", 6' 0", 6' 1", 6' 2", 6' 3", 6' 4", and 6' 5". Below this is a note: 'Used to put reports in SATB order 1=Soprano, 2=Alto, 3=Tenor, 4=Baritone/Bass'. There are radio buttons for 'SATB sort' with options 1, 2, 3, and 4. A 'Bio' text area is at the bottom.</p>	<p>8. NSCS Member data (far right tab on the View Contact screen) is used to enter voice part and height data. The Member Display Name shows the preferred name to be printed in the concert booklet.</p>  <p>The close-up shows the 'SATB' dropdown menu with options: '- none -', Soprano, Alto, Tenor, Bass. The 'Divisi' dropdown menu has options: '- none -', First, Second.</p>

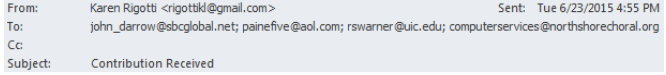
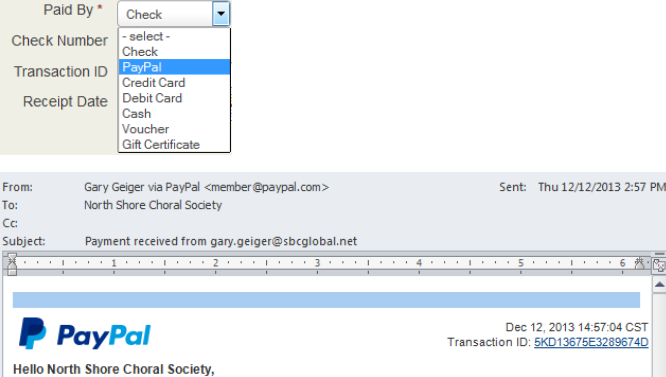
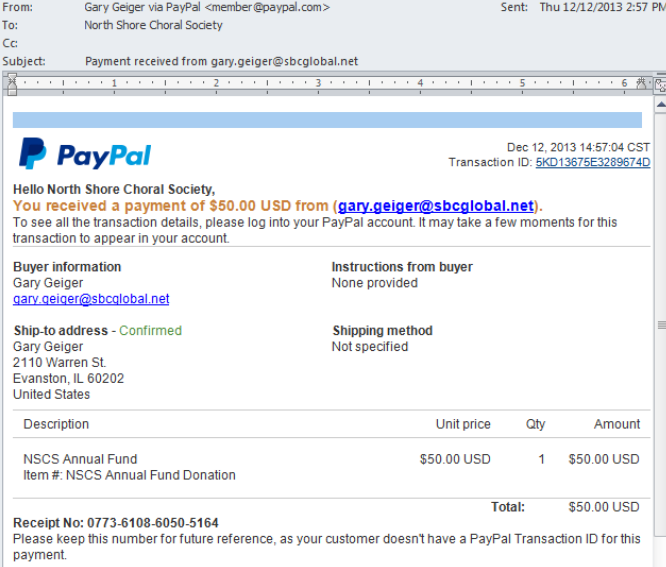
North Shore Choral Society Job Procedures: Computer Services Team

Illustrations: CiviCRM (Contributions)	Notes
 <p>CiviCRM » CiviContribute Dashboard New Contribution</p> <p>Buttons: Save, Save and New, Cancel</p> <p>Fields: Contact * (dropdown), Financial Type * (input), Total Amount * (input), Source (input)</p> <p>Dropdown options: - select contact -, Start typing a name or email... or, New Individual, New Organization, New Household</p>	<p>New Contribution</p> <p>1. To enter a contribution, start with Contact selection. If the search for an individual or organization is unsuccessful, you can enter minimal information to establish a new contact, and follow Contact Data Update instructions (see previous pages) to add data after the contribution is entered. An asterisk * identifies required fields. NOTE: For first-time contributors, please be sure to enter a Donor Display Name for the contact (in the NSCS Patron Preferences section).</p>
 <p>New Contribution</p> <p>Buttons: Save, Save and New, Cancel</p> <p>Fields: Contact * (dropdown), Financial Type * (dropdown), Total Amount * (input), Source (input), Campaign (dropdown), Contribution Status (dropdown)</p> <p>Annotations: "used for contributions by individuals" points to Donation, Donation DAF/QCD, and Donation of Stock; "used for ticket sales" points to Event Fee; "will be used in the future?" points to Member Dues; "used for contributions by organizations" points to Corporate Gift and Grant.</p> <p>— Financial Types —</p> <p>Financial Type * (dropdown menu): - select -, Corporate Gift, Donation, Donation DAF/QCD, Donation of Stock, Event Fee, Grant, Member Dues</p>	<p>2. After selecting or creating a contact, select the appropriate Financial Type (usually <i>Donation</i> for individual contributions) and enter the Total Amount.</p> <p>For Source, specify how Computer Services was first informed of this contribution (usually <i>NSCS (Karen Rigotti) email</i> or <i>John Darrow email</i> or <i>Nancy Slichenmyer email</i>, but sometimes <i>PayPal</i>).</p> <p>However, for <i>Donation DAF/QCD</i> put the Fund/Account name in Source. (e.g., <i>Schwab Donor Advised Fund, TD Ameritrade</i>).</p>

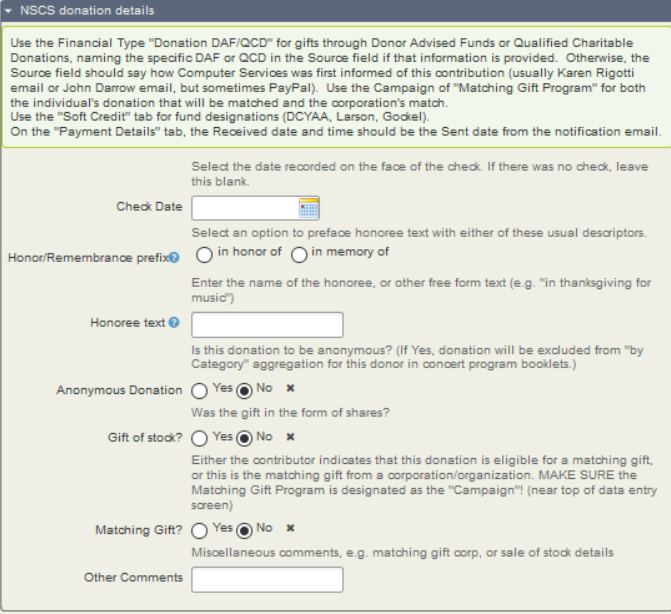
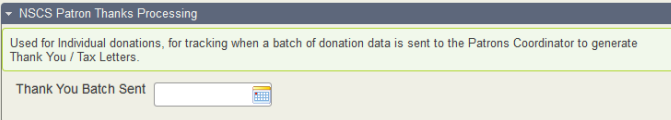
North Shore Choral Society Job Procedures: Computer Services Team

Illustrations: CiviCRM (Contributions)	Notes
 <p>The screenshot shows the 'Campaign' dropdown menu with options: '- select -', '80th Season 2015-2016 (07/01/2015-06/30/2016)', and 'Matching Gift Program (07/01/2000)'. The 'Contribution Status' dropdown is set to 'Completed'.</p>	<p>3. If this is a matching gift (either an individual's gift that will be matched or a corporate gift that is the match), select the <i>Matching Gift Program</i> campaign.</p> <p>Otherwise, you can select the current season as the Campaign.</p> <p>Let the Contribution Status default to <i>Completed</i>.</p>
 <p>The screenshots show the 'Soft Credit' section with the 'Contact' dropdown menu open. The first screenshot shows 'DCYAA (Donald Chen Young Artist Award)' selected. The second shows 'Ruth A. Gockel Memorial Fund' selected. The third shows 'David Dynes Larson Memorial Gift' selected.</p>	<p>4. If all or a portion of a gift is to be allocated to a Designated Use Fund (<i>DCYAA, Larson, or Gockel</i>), use the Soft Credit section to specify this.</p> <p>Each of these funds has been defined as an Organization, so just start typing one of those three in the Contact search field and select it when it is displayed.</p> <p>Put the amount to be allocated to the fund in the Amount field. (You don't need to put in the dollar sign.) Specify a Type of <i>Special Fund</i>.</p> <p>A soft credit of the type <i>Household</i> is entered to credit an NSCS Board member when contributions are recorded as given by the spouse of the Board member. (This happens only if both are members, and the one on the NSCS Board is not the one we use to record the household's contributions.)</p>

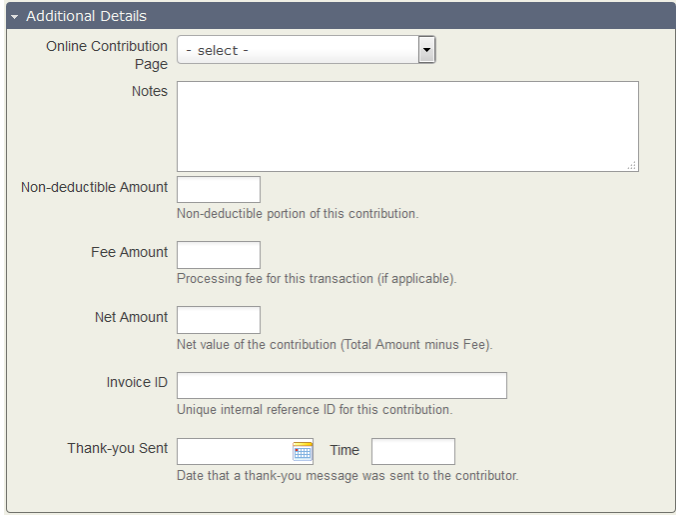
North Shore Choral Society Job Procedures: Computer Services Team

Illustrations: CiviCRM (Contributions)	Notes
	<p>5. Within the Payment Details section, the Received date and Time fields should be the Sent date from the notification email, unless the date that NSCS took possession of the check or funds is specified in the body of the message. The postmarked date can be used, if that date is communicated. The Notes field can document which date was used.</p> <p>Paid By is usually <i>Check</i> (default). We don't currently record the Check Number.</p>
	<p>6. Occasionally we receive donations via PayPal; in that case, <i>PayPal</i> should be selected as the Paid By value, and the Transaction ID copied from the PayPal email.</p>
	<p>7. For a PayPal transaction, there is sometimes a Receipt No. Receipt No: 1901-9949-7446-5702 printed below the total line, with the text "Please keep this number for future reference, as your customer doesn't have a PayPal Transaction ID for this payment."</p> <p>This line may be copied and pasted into the Notes field of the Additional Details tab.</p> <p>(See #10 below.)</p>

North Shore Choral Society Job Procedures: Computer Services Team

Illustrations: CiviCRM (Contributions)	Notes
	<p>8. Other info specific to NSCS is entered in the NSCS Donation Details section. (There is some NSCS-specific Help text displayed at the beginning of this section.)</p> <p>Although we don't record check number, we <u>do</u> record the date of the check, which is the date specified within notification emails.</p> <p>Be sure to use <i>&</i> instead of "and" in the Honoree text field when multiple people are honored. (Patron & Concert Program Booklet Coordinator request)</p>
	<p>9. The NSCS Patrons Thanks Processing tab is not updated when a contribution is received. The date recorded specifies when the batch containing this contribution was sent to the Patrons Coordinator. (This is the NSCS-specific version of the Thank-you Sent Date field in the Additional Details tab. It is usually updated via the "Batch Update for Contributions" action using the <i>NSCS Thank You Letter Batch Update profile</i>.)</p>

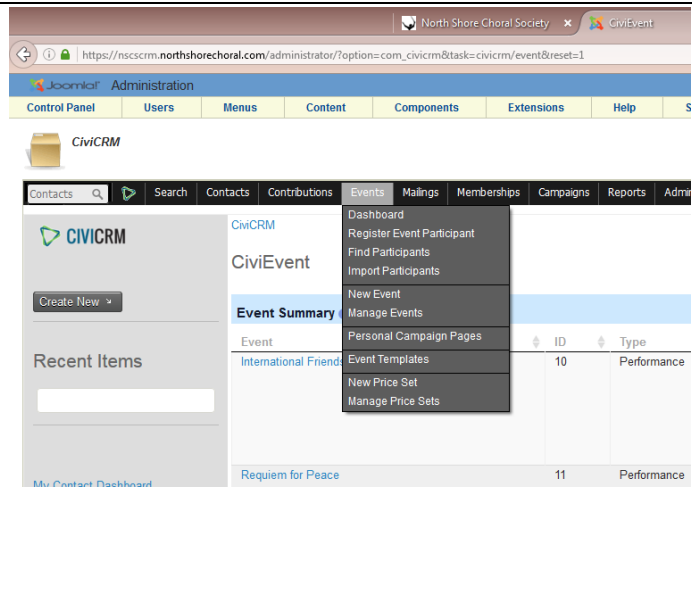
North Shore Choral Society Job Procedures: Computer Services Team

Illustrations: CiviCRM (Contributions)	Notes
 <p>Additional Details</p> <p>Online Contribution Page: - select -</p> <p>Notes</p> <p>Non-deductible Amount: [input field] Non-deductible portion of this contribution.</p> <p>Fee Amount: [input field] Processing fee for this transaction (if applicable).</p> <p>Net Amount: [input field] Net value of the contribution (Total Amount minus Fee).</p> <p>Invoice ID: [input field] Unique internal reference ID for this contribution.</p> <p>Thank-you Sent: [calendar icon] [input field] Time: [input field] Date that a thank-you message was sent to the contributor.</p>	<p>10. The Additional Details section contains CiviCRM fields that we might use some day; for now if we need a place to put the <i>PayPal Receipt Number</i>, that text and the number itself (1901-9949-7446-5702) can be recorded in the Notes field of this section.</p>

North Shore Choral Society Job Procedures: Computer Services Team

Illustrations: CiviCRM (Ticket Sales)	Notes
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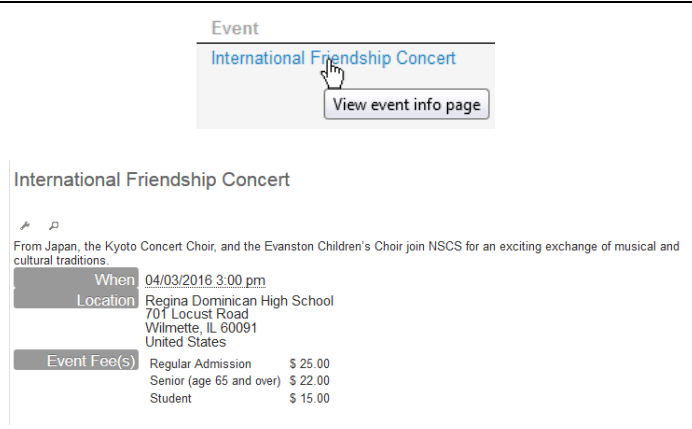
These illustrations assume you are logged in to the Joomla back end (administrator functions) and are accessing the CiviCRM component.



Prerequisites

A. A ticket purchase is related to an **Event**; purchases can be recorded via the “Register Event Participant” function in the Events menu. In addition to each concert, each NSCS season should be defined as an event, so that season ticket sales can be recorded.

To verify that appropriate Events have been created, review the **Dashboard** or the items listed on the **Manage Events** screen.



B. To verify that the event for which you want to record a ticket sale has been associated with a **Price Set** (which records types of tickets and their prices), view the **event info page** by clicking on the **Event** name. (The link is available on most screens where Event name is shown.)

More Background Information

An **Event Participant** record is created:

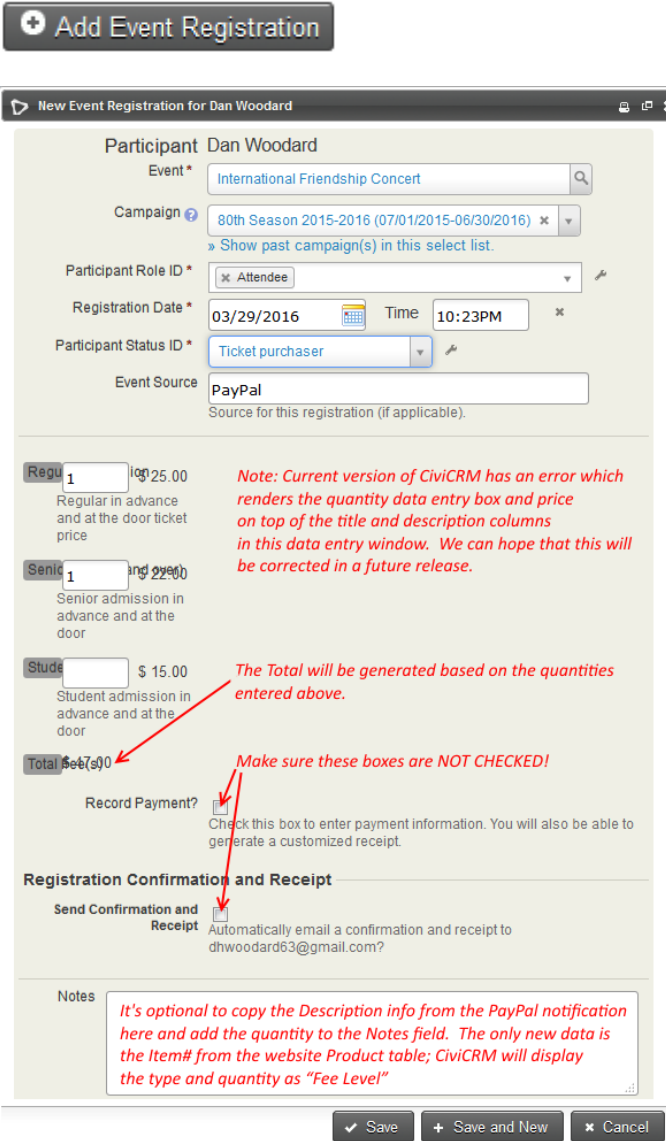
- a) On behalf of the Tickets Coordinator, to record the purchase of season or concert tickets by a Contact.

The Participant’s Role is **Attendee**.

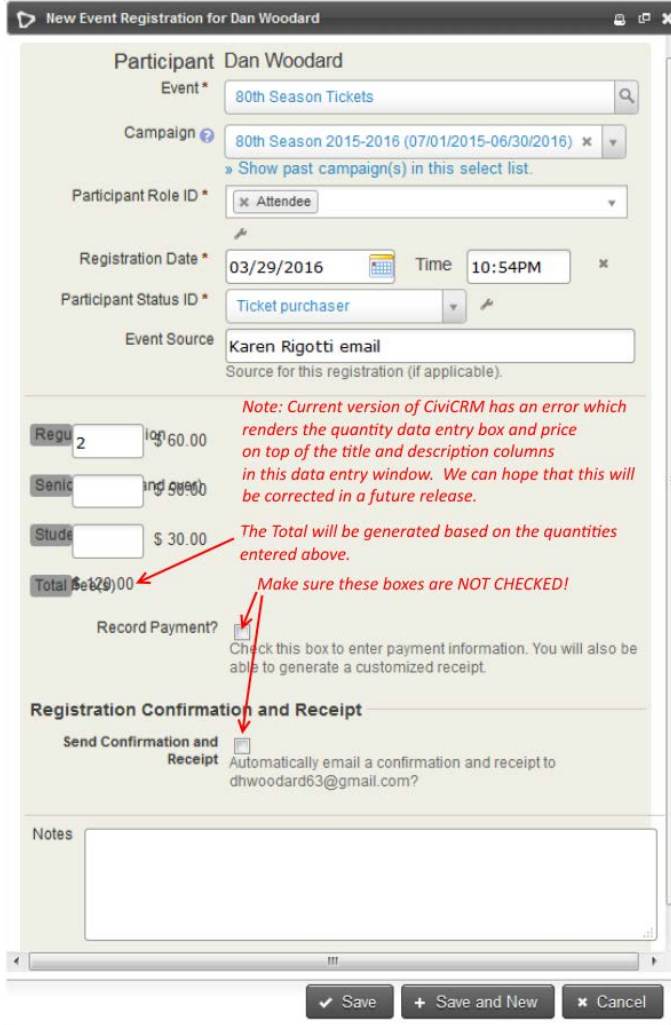
- b) On behalf of the Membership Coordinator, to register that an NSCS member will participate in a concert. The Participant’s Role is **Singer**. (An additional Role can be added for **Chamber Choir**. **Soloist**, **Instrumentalist** roles are also enabled, but these are all “uncounted” roles on the Dashboard. “Counted” reflects only Registered Singers.)

Status	Role
Ticket purchaser	Attendee
Registered	Singer, Chamber Choir

North Shore Choral Society Job Procedures: Computer Services Team

Illustrations: CiviCRM (Ticket Sales)	Notes
<p>Hint: Because a ticket sale represents a transaction relating a Contact and an Event, data entry can be initiated either via a “View Contact” screen or the “Register Event Participant” function from the Events menu. If the purchaser is <i>not</i> a name you recognize, the “View Contact” screen is the better option. This allows you to check the street address and email to verify that the purchaser is already in the database (or to add the Contact), or to change the first name if another household member is now ordering tickets.</p>	
 <p>1. Ticket Purchase via PayPal</p> <ul style="list-style-type: none"> • From the View Contact screen for the ticket purchaser, select the Events tab. • Select “Add Event Registration” • Select the Event (either the concert name or <i>NNth Season Tickets</i>). The associated Campaign (NSCS season) should automatically appear. • Allow the Participant Role ID to default to Attendee. • Enter the PayPal transaction date and time on the PayPal notification email as the Registration Date and Time. • Enter the Participant Status ID of Ticket Purchaser. • Enter the Event Source of PayPal. • Enter the number of tickets of each type purchased in the appropriate boxes. The Total Fee(s) should match the PayPal payment total. • Do <u>not</u> select the Record Payment or Send Confirmation boxes. Click Save. 	
<p>If you don't get a notification box that the registration has been saved, you may have neglected to enter a required (*) field.</p>	

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 <p data-bbox="227 1270 787 1386">If you don't get a notification box that the registration has been saved, you may have neglected to enter a required (*) field.</p>	<p data-bbox="868 231 1291 315">2. <i>Ticket Purchase by check, notification via email</i></p> <ul data-bbox="868 325 1412 1711" style="list-style-type: none"> • From the View Contact screen for the ticket purchaser, select the Events tab. • Select “Add Event Registration” • Select the Event (either the concert name or <i>NNth Season Tickets</i>). The associated Campaign (NSCS season) should automatically appear. • Allow the Participant Role ID to default to Attendee. • Enter the sent date and time on the email as the Registration Date and Time. • Enter the Participant Status ID of <i>Ticket Purchaser</i>. • Enter the Event Source of <i>[Name] email</i> (who sent the email). • If known, enter the number of tickets of each type purchased in the appropriate boxes. The Total Fee(s) should match the PayPal payment total. If the email does not specify the quantity/type of tickets, leave the boxes blank. • Do <u>not</u> select the Record Payment or Send Confirmation boxes. Click Save.